

BI Reporting Job Aid

Reduction in Force (RIF)

Reduction in Force

While job security is important to everyone, it is sometimes necessary for the state to reduce the number of people it employs due of lack of work, loss of funding, reorganization or other similar reasons. If a reduction in force (RIF) occurs, every effort will be made to assist employees in securing another job.

Agencies must give employees at least 30 calendar days notice of an impending reduction in force. This notice must be in writing and should contain the reasons for the reduction in force, the expected date of separation from state government, information on priority reemployment rights and any applicable appeal rights.

Two reports are available to review and analyze data related to a Reduction in Force, RIF. This job aid provides an overview of those reports, their intended use, and navigation tips. The reports are:

- B0020: RIF Verification
- B0021: Employees Eligible for RIF Priority

Selection criteria are explained for the B0020 report in this job aid. Additional navigation tips, such as how to filter, total, and move columns on the reports are included in the section for the B0020 report. These navigation tips can be used in any of the reports.

B0020 – RIF Verification (starts on page 02)

This report lists all actions for an employee. B0021 is designed as follows:

References infotype 0041 - Date Specifications to see if there is a value of 06 - Notification of RIF.

B0021 – Employees Eligible for RIF Priority (starts on page 07)

This report lists employees who have been separated due to RIF. It includes the date they were notified about being placed on RIF and the date when their RIF Priority ends.

***NOTE:** While this document contains real examples of the reports, every effort has been taken to protect the privacy of the individuals whose data is utilized. In order to achieve this, the screen shots that contain salary information have been taken from an unidentified agency and do not match the positions and jobs which are shown.

B0020 RIF Verification Report

INTEGRITY
CONSISTENCY
BEACON
North Carolina
Office of the State Controller

Home | My Staff (MSS) | **Reports** | SAP GUI

Welcome | Personnel Admin | Organization Mgmt | TEST | Benefits | Cost Center

Business Intelligence

Business Intelligence (BI) reports help HR staff and agency managers track and analyze business functions in their agencies. BI functions as a standalone system pulling data from SAP to create analysis, summary, trends, and other types of reports. Go to the [BI Reporting](#) online course to learn more.

Training

To take the BI Reporting online course:

- Log on to BEACON University at <http://www.beacon.nc.gov>
- Click the Training tab
- Click the BI Reporting button

QA News

Service Notes:

01/22/2008 - The printing limit has been extended, and you can now print reports with at least 150 screen pages.

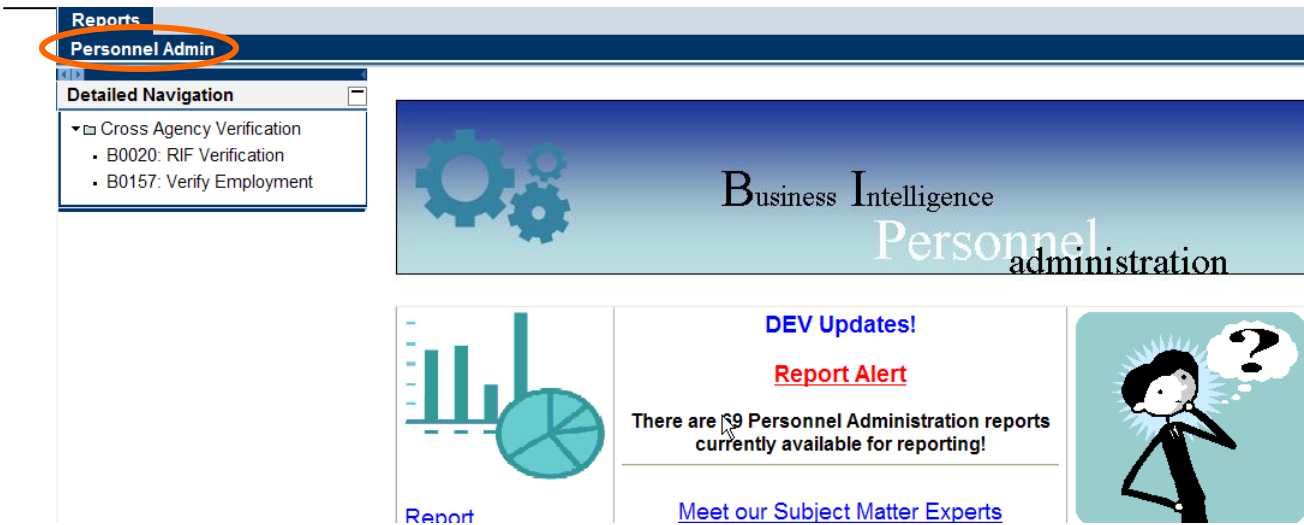
HELP

If you need assistance with a BI report please contact the Shared

1. Access the BEACON Portal.
2. Click on the **Reports Tab**.

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3. Click on **Personnel Admin**.



4. Select Report from the workset on the left.

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5. Click on **Cross Agency Verification** folder (click on the black arrow to expand folder).





6. Click on **B0020 RIF Verification**.

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Variable Entry


Available Variants: Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Last 4 Digits of SSN (XXXX - Sing		
* Last Name of Employee in UPPEI		

OK Check

- Enter the Last 4 Digits of SSN by clicking on the  icon to search for a SSN, or by keying a 4-Digit number directly into the box.
- Enter a **Last Name in UPPERCASE** by clicking on the  icon to search for a name, or by keying a Last Name directly into the box.

NOTE: The report will only return the data for which you have security to view.

- Click the  button and wait for the report to be displayed.

B0020: RIF Verification

No exceptions are defined

Personnel Area	Employee	Hours per week	Employee's Name	Job	Schematic Code	Effective Date
State	1234567	40.00	MOUSE, MICKEY	Personnel Analyst I	30000997 1821	01/01/2008

Action Reason	Position	Pos Pay Level	Pos County	Emp Pay Level	Annual Salary
01 CONVERSION-Withdrawn	99999999 99999999	#	# Not assigned	59	0

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To access **B0021: Employees Eligible for RIF Priority**, the user must ‘jump’ to the report via a report to report interface.

To jump to B0021, right-click on a specific row and column of interest (in the gray area) and then select **Goto > B0021: Employee Eligible for RIF Priority**.

In the following example, the cursor is placed at the row with a specific **Employee** value in the column then right-click and select **Goto->B0021: Employees Eligible for RIF Priority**. This action will then launch the B0021 report and pre-filter the B0021 data elements based on the specific values coming from the B0020 report:

B0020: RIF Verification

Display As [Information](#) [Print Version](#) [Export to Excel](#)

- Columns
 - Key Figures
- Rows
 - Personnel Area
 - Employee
 - Job
 - Schematic Code
 - Effective Date
 - Action Type
 - Action Reason
 - Position

Personnel Area	Employee	Hours per week	Job	Schema
Not assigned		0.00	Not assigned	# #

- Back
- Goto** → **B0021: Employees Eligible for RIF Priority**
- Filter
- Change Drilldown
- Broadcast and Export
- Properties
- Exceptions
- Sort Personnel Area

Based on the above filtering, the results for B0021 are shown below. The B0021 report shows the employee(s) which meet the above filtering criteria.

B0021: Employees Eligible for RIF



Employee's Name	Employee	Notification Date	Priority End Date
MOUSE, MICKEY	1234567	06/01/2008	06/01/2009

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B0021 Employees Eligible for RIF Priority Report

B0021: Employees Eligible for RIF

Employee's Name	Employee	Notification Date	Priority End Date
MOUSE, MICKEY	1234567	06/01/2008	06/01/2009

The B0021 report will display all employees within the selected area which match the selection criteria.

NOTE: You may drag columns on or off the report using standard BI reporting functionality. Some examples of how to alter the view of the report are included in this document.

The columns in the “ledger” (blue and white) area of the report cannot be moved or manipulated.

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Moving a column on the report using drag and drop functionality

Personnel Area	Employee	Hours per week	Employee's Name	Job	Schematic Code	Effective Date	Action Type	Action Reason	
State	1234567	40.00	MOUSE, MICKEY	Personnel Analyst I	30000997	1821	01/01/2008 ZW	CONVERSION-Withdrawn	01 CONVERSION-Withdrawn
State	8910111	40.00	FUDD, ELMER	Personnel Analyst I	30009999	1800	03/08/2008 Z2	Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G

1. Click on the column heading and drag it to the position on the report where you want it (watch for the dark black line), then let go of the mouse button. In this example we will drag the Employee field to the right of the Hours per Week field.

Personnel Area	Hours per week	Employee	Employee's Name	Job	Schematic Code	Effective Date	Action Type	Action Reason	
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	1821	01/01/2008 ZW	CONVERSION-Withdrawn	01 CONVERSION-Withdrawn
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	1800	03/08/2008 Z2	Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G

Notice that now the Employee column is to the right of the Hours per Week column. This report is now arranged by Employee within Hours per Week.

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Removing a column on the report

Personnel Area	Employee	Hours per week	Employee's Name	Job	Schematic Code	Effective Date	Action Type	Action Reason
State	1234567	40.00	MOUSE, MICKEY	Personnel Analyst I	30000997	1821	01/01/2008 ZW	CONVERSION-Withdrawn
State	8910111	40.00	FUDD, ELMER	Personnel Analyst I	30009999	1800	03/08/2008 Z2	Re-Instatement (NC)

1. Click on the column heading and drag it up to the dark blue area of the screen, then let go of the mouse button. In this example we will eliminate the Schematic Code column by dragging and dropping its column heading into the dark gray area.

Personnel Area	Hours per week	Employee	Employee's Name	Job	Effective Date	Action Type	Action Reason
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	01/01/2008 ZW	CONVERSION-Withdrawn
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008 Z2	Re-Instatement (NC)

Notice that the Schematic Code column is no longer shown in the report.


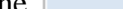
Filtering the report to see only positions in a particular Employee Subgroup

Schematic Code	Effective Date	Action Type	Action Reason
#	01/01/2008	ZW	CONVERSION-Withdrawn
1821	03/08/2008	Z2	Rtn St w/in 12 mths-Same S/G
1813	04/30/2008	Z2	Probation
#	08/04/1977	Z2	Active

Goto
Filter
 Change Drilldown
 Broadcast and Export
 Properties
 Exceptions
 Sort Action Type

Keep Filter Value
 Keep Filter Value on Axis
 Filter and Drill Down By
Select Filter Value
 Remove Filter Value
 Variable Screen

1. Right-click on the **Action Type** column.
2. Click on **Filter > Select Filter Value**.

- Click on the  in front of the value “**Z2**” to select only the **Z2** Action Types. Values on the left hand side represent the values that are included on the report you are viewing. If you don’t see a particular value, it means that this value does not occur in the current report being displayed.
- Click the  button.

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Select values for Action Type (0ACTIONTYPE)

Show tool: Show view:

All

Maximum

Action Type Key	Action Type Medium Text
<input type="checkbox"/>	
<input checked="" type="checkbox"/> Z2	Re-Instatement (NC)
<input type="checkbox"/> Z9	Appointment Change (NC)
<input type="checkbox"/> ZW	CONVERSION-Withdrawn
<input type="checkbox"/> ZZ	CONVERSION-Active
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Enter a value for Action Type:


Selections

Type	Description
<input checked="" type="checkbox"/> =	Z2 Re-Instatement (NC)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

5. Click .

NOTE: If the item to be filtered on is not located in the right-hand column (as a result of clicking the Add button), it will not be filtered.

Now the report only shows employees that have an Action Type of Z2, Re-instatement.

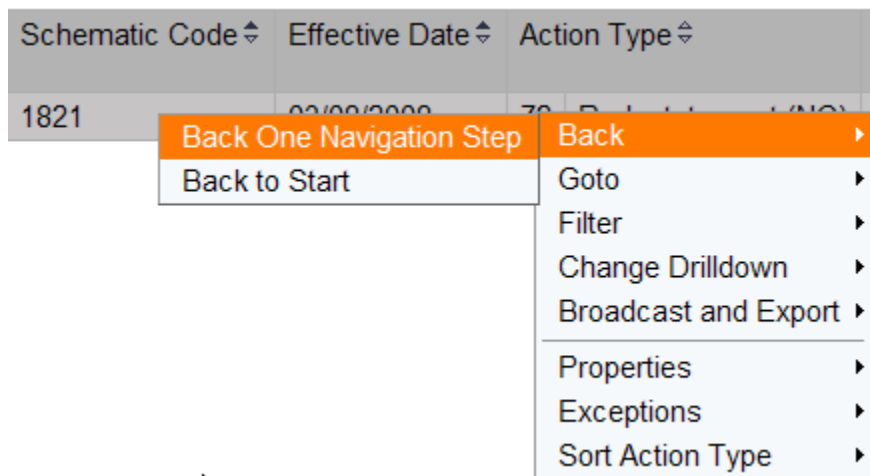
Personnel Area	Hours per week	Employee	Employee's Name	Job	Effective Date	Action Type	Action Reason	Position		
State 	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	99999999	99999999

This same technique can be used to filter the values for other columns on the report.

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To go back one step



1. Right-click anywhere within the **gray portion** of the report (not the blue area).
2. Click on **Back > Back One Navigation Step**. This will cause the report to revert back to how it looked before the filter was set.

Personnel Area	Hours per week	Employee	Employee's Name	Job		Effective Date	Action Type	Action Reason	Position
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	01/01/2008	ZW CONVERSION-Withdrawn	01 CONVERSION-Withdrawn	99999999
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	99999999

Now the report is back to the way it looked prior to applying the filter.

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Additional Filtering Options



1. Click on the **Filter** link at the top of screen (scroll over to the right if you do not see it).

To adjust filter area, drag characteristics from navigation area into filter area

Action Reason:	Show All Values	Action Type:	Show All Values	Agency Hire Date:	Show All Values
Age Range:	Show All Values	Cal Mth/Yr:	Show All Values	Country:	Show All Values
Effective Date:	Show All Values	Employee:	Show All Values	Employee's Name:	Show All Values
Employee Group:	Show All Values	Employee Subgroup:	!Contractor	Employment Status:	Show All Values
Emp Pay Area:	Show All Values	Emp Pay Group:	Show All Values	Emp Pay Level:	Show All Values
Emp Pay Type:	Show All Values	ESG CAP:	Show All Values	Ethnic Origin:	Show All Values
Fiscal period/year:	Show All Values	Gender:	Show All Values	Job:	Show All Values
Job Branch:	Show All Values	Job Family:	Show All Values	Key Figures:	Show All Values
Last Four of SSN:	2728	Length of Serv. as of Date of Action:	Show All Values	Organizational Unit:	Show All Values
Original Hire Date:	Show All Values	Personnel Area:	Show All Values	Personnel Subarea:	Show All Values
Pos Addr Street:	Show All Values	Pos City:	Show All Values	Pos Country:	Show All Values
Pos County:	Show All Values	Position:	Show All Values	Pos Pay Area:	Show All Values
Pos Pay Group:	Show All Values	Pos Pay Level:	Show All Values	Pos Pay Type:	Show All Values
Pos State:	Show All Values	Prior Position:	Show All Values	Processed Date:	Show All Values
Schematic Code:	Show All Values	SOC Code:	Show All Values	Supv Employee:	Show All Values
Supv Position:	Show All Values				

Additional options for filtering the report are now available. Note that the values on which you may filter are based on the available data elements shown on the existing report.

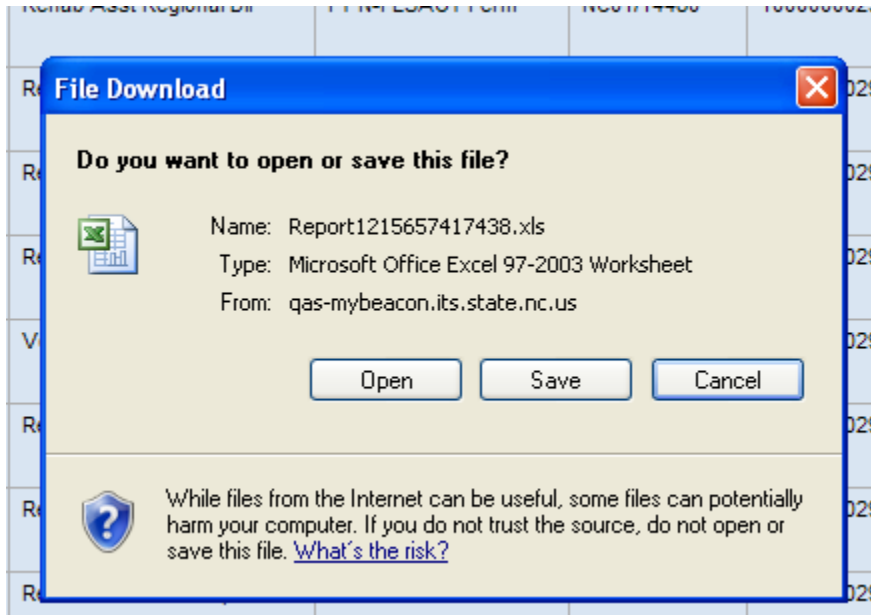
2. Click the **Close** button to hide the filter screen or click **Variable Screen** button to keep your filter settings and go back and choose another Employee.

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Exporting to Excel

To export to Excel, click on the **Export to Excel** button.



You will be presented with an option to Open or Save the file (this is up to you). It all depends on whether you want to save the file before viewing it, or after viewing it.

B0020: RIF Verification

No exceptions are defined

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Personnel Area	Hours per week	Employee	Employee's Name	Job		Effective Date	Action Type	Action Reason	Position
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	01/01/2008	ZW CONVERSION-Withdrawn	01 CONVERSION-Withdrawn	99999999
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	99999999

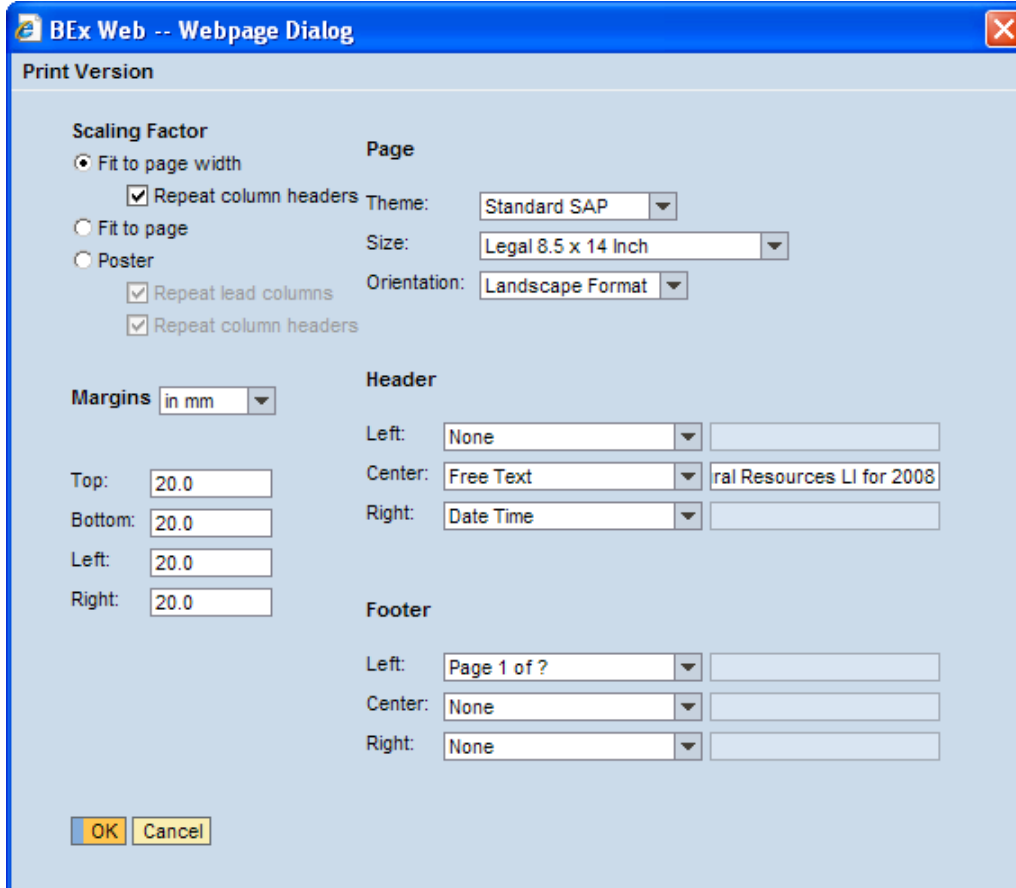
This is a sample of what the output might look like in Excel.

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Printing the Report

While we do not recommend printing BI reports, there may be times when you wish to do so. To generate a printed copy, click on the **Print Version** button.



BEx Web -- Webpage Dialog

Print Version

Scaling Factor

- ☒ Fit to page width
- ☐ Fit to page
- ☐ Poster

Page

Theme: **Standard SAP**

Size: **Legal 8.5 x 14 Inch**

Orientation: **Landscape Format**

☒ Repeat column headers

☒ Repeat lead columns

☒ Repeat column headers

Margins in mm

Top: **20.0**

Bottom: **20.0**

Left: **20.0**

Right: **20.0**

Header

Left: **None**

Center: **Free Text** **ral Resources LI for 2008**

Right: **Date Time**

Footer

Left: **Page 1 of ?**

Center: **None**

Right: **None**

OK **Cancel**

Leave the **Margins** as is, for when you change to inches it causes a formatting issue. You may select Portrait or Landscape format. In this example, we have chosen Landscape format.

Personnel Area	Job		Schematic Code	Effective Date	Action Type	Action Reason	Pos Pay Level	Pos County	Emp Pay Level	Annual Salary	
Administration	Not assigned	#	#	01/01/2008	ZW CONVERSION-Withdrawn	01 CONVERSION-Withdrawn	#	#	Not assigned	59	0
Health Human Services	Personnel Analyst I	30001000	1821	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same SI/G	#	092	Wake	70	22
	Personnel Technician III	30000997	1813	04/30/2008	Z9 Appointment Change (NC)	08 Supplemental to Probation	#	092	Wake	68	49,637
Not assigned	Not assigned	#	#	08/04/1977	ZZ CONVERSION-Active	01 CONVERSION-Active	#	#	Not assigned	NA	0

The resulting report will be displayed in PDF format. You will then want to choose the Print functionality from within your web browser to print the report.

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Key BI Points to Remember:

- Do not use the Back button on the browser to go back. (Instead use “Back One Navigation Step”.)
- BI Reports sort from the left to right.
- Columns can be removed by dragging up and dropping in the gray area.
- To generate totals for a particular column, right-click on the column to the immediate right and choose Properties > Characteristic>General Tab. In the Display Data Values field choose Always. This will cause the report to total by that column.
- A ‘#’ in the field indicates that there is no value for this field in SAP.

NOTE: The report will only return the data for which you have security to view.

APPENDIX

The description of fields on the reports are as follows:

Personnel Area	Agency
Position	Position number and Title
Employee	Employee Personnel Number
Employee Name	Employee Last and First name
Last 4 of SSN	Last 4 digits of Employee’s SSN
Employee Pay Level	<p>Employee pay level information in the following format: AA/BB/CC/D/EEEE/FF where:</p> <ul style="list-style-type: none"> • AA = Country (always 10 for USA) • BB = Pay Scale Type (01 = Graded, 02 = Banded, etc.) • CC = Pay Scale Area (1 = hourly, 2 = salaried) • DD = Sub grouping for Personnel Calculation Rule • EEEE = Pay Grade (GR## if graded, otherwise 8 digit id) • FF = Level (Represents the salary grade for graded employees, and the Competency Level for banded employees) <p>NOTE: These values cannot be separated into separate columns on the report, but are available for your reference.</p>